Hotel: Holiday Inn Toronto Yorkdale
3450 Dufferin St., Toronto M6A 2V1
Located at Dufferin and Highway 401, with easy access to downtown Toronto, Pearson Airport, and many major attractions. Quote "Catering" to get 5% off your room rate; to reserve a room, call ***1-888-HOLIDAY*** *or email* **CDN-Reservations2@ihg.com**.

Name: ______________________________

Phone: (_____) _____ - ____________

Address: ____________________________

____

____

Method of Payment (check one)

❑ Cheque ❑ Visa ❑ MasterCard
❑ Discover ❑ American Express

Credit Card number:

____

Exp. date: ____/____

Signature: ___________________________

Cancellation Policy: Cancellations received up to 14 working days before the workshop are refundable, minus a $50 registration service charge. After that, cancellations are subject to the entire fee, which you may apply toward a future conference or workshop. Please note: if you don't cancel and don't attend, you are still responsible for payment. Substitutions may be made at any time. For more information regarding refund, complaint, and/or program cancellation policies, please contact our office at 1-800-875-1760.

Topics include:

- Advanced Case Studies
- Bankruptcy and Divorce
- Business Valuations & Unjust Enrichment
- CDFA-Lawyer Partnership
- eMarketing your Divorce Practice
- Finding Fraud in Divorce Cases
- Tax Traps and Tips

Who should attend?

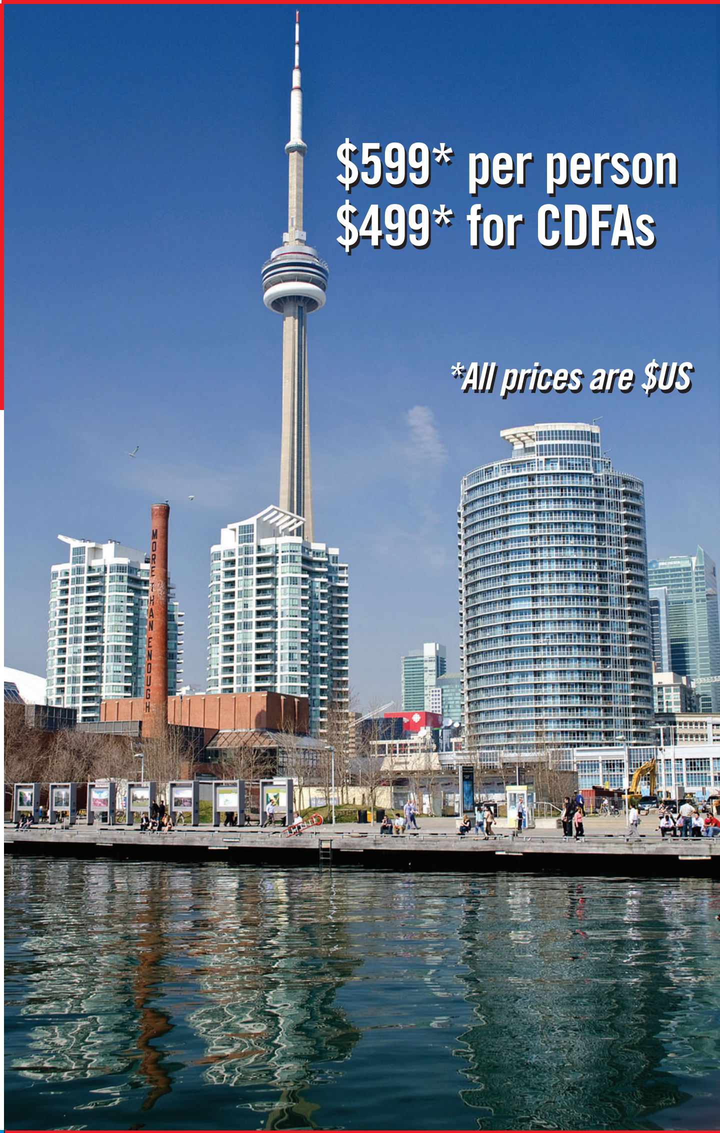
The level of this series is advanced; attendees will include CDFAs™, CAs, CGAs, CFPs®, financial professionals, and lawyers. Even if you have attended a prior Advanced Workshop, you won't want to miss this newest series.

Receive up to 15 CE Credits for your CDFA™ and CFP® designations

Prerequisites

No advance preparation is required. In order to attend, you must currently be a CDFA™ member, CA, CGA, CFP®, financial professional, or a lawyer.

Toronto, ON June 6–7, '13



Canadian Advanced Topics Workshop

The Topics and Presenters

Keynote Address:
Divorce 2.0: The Lawyer-CDFA Partnership
Divorce lawyer Maureen Tabuchi will discuss Canada's family law system: how it's supposed to work; how it actually works; and how CDFAs can work within the system to improve outcomes for our clients. She will also discuss the Lawyer-CDFA Partnership, including:

- the five things lawyers need CDFAs to do for them
- how to work with lawyers to produce the best outcomes for clients
- how to approach lawyer prospects so they can see how a CDFA could add value to their practices
- overcoming lawyer objections to hiring a CDFA.

Presenter: **Maureen C. Tabuchi (LL.B., MTAX, CDFA™)**

Advanced Case Studies
This session will walk you through a couple of cases that will expand your knowledge of divorce-related tax, financial-planning, and lifestyle-analysis issues while challenging your creativity and problem-solving skills. Learn key strategies for dealing with the rapidly-changing realities of divorce in this economy. There will also be an overview of Family Law Software: the new software being used for Canadian CDFA candidates. ***Presenter:*** **Daniel Caine (MBA, JD)**

Bankruptcy and Divorce
This session will provide an overview of the alternatives available to Canadians to deal with their financial difficulties, including: refinancing/debt consolidation, debt management programs, proposals to creditors, and bankruptcy. The overview will be followed by a detailed explanation of insolvency law – in particular how consumer proposals and personal bankruptcy work – and the session will conclude with two case studies demonstrating the advantages and disadvantages of the various strategies.
Presenter: **Ted Michalos (CA, certified insolvency counsellor, and a licensed trustee in bankruptcy)**

Business Valuations & Unjust Enrichment
When one or both parties in a matrimonial separation owns a business, shares of a company, etc., a business valuator must determine the value of the assets. This session will also introduce the doctrine of "Unjust Enrichment": an equitable concept created to remedy injustices that occur where one person makes a substantial contribution to the property of another person without compensation.
Presenter: **Matthew Krofchick (CMA, CBV, CMC)**

eMarketing your Divorce Practice
This session will discuss using blogs, websites, and social media as well as contributing articles to traditional and e-news outlets to grow your divorce practice and reputation. eMarketing guru Martha Chan will review some of the participants' websites, blogs, and social-media pages and let them know what they're doing right and where there's room for improvement. The session will also discuss traditional marketing strategies, examining what works, what doesn't, and why. You'll learn what to do (and what's a waste of time/money), what it will cost (in terms of time/money), how to get started, and how to continue.
Presenter: **Martha Chan (MBA)**

Finding Fraud in Divorce Cases. During a divorce, marital assets may be missing, hidden, or dissipated. This session will demonstrate the use of forensic accounting and fraud examination principles to gather evidence to put the pieces of the "financial puzzle" together so a true picture emerges. Learn to recognize red flags, and which documents are key to uncovering fraud.
Presenter: **Peggy Tracy (CFE, CFP®, CDFA™)**

Tax Traps and Tips
In a divorce, all assets are *not* created equal. Unfortunately, most people – including lawyers – don't understand how taxes will impact the property received as part of a divorce settlement, leaving many clients holding the bag for the taxman. Understanding how taxes will affect the three main sources of money in divorce – child support, spousal support, and property division – will make you an invaluable resource for your divorcing clients.
Presenter: **Mary Krauel (CPA, CA, MBA, CDFA™)**

The Schedule

Thursday, June 6, 2013

7:00 a.m.–8:00 a.m. **Registration/Light Breakfast**

8:00 a.m.–10:00 a.m. **"Tax Traps and Tips"**

10:00 a.m.–12:00 p.m. **Keynote Address "Divorce 2.0: The Lawyer-CDFA Partnership"**

12:00 p.m.–1:00 p.m. ***Lunch Buffet***

1:00 p.m.–3:00 p.m. **"Advanced Case Studies"**

3:00 p.m.–5:00 p.m. **"eMarketing your Practice"**

Friday, June 7, 2013

7:00 a.m–8:00 a.m. **Light Breakfast**

8:00 a.m.–10:00 a.m. **"Business Valuations"**

10:00 a.m.–12:00 p.m. **"Bankruptcy and Divorce"**

12:00 p.m.–1:00 p.m. ***Lunch Buffet***

1:00 p.m.–4:00 p.m. **"Finding Fraud in Divorce"**

For more information, or to reserve your space in the Workshop, please contact IDFA today.

- Phone: (800) 875-1760
- Fax: (888) 473-1073
- E-mail info@InstituteDFA.com
- Website: www.InstituteDFA.com

CELEBRATING 20 YEARS 1993–2013
Institute for Divorce Financial Analysts™